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2016 Nonresident Visitation, Expenditures & Economic Impact Estimates

Kara Grau

University of Montana - Missoula

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2016 Nonresident Visitation, Expenditures & Economic Impact Estimates

Estimates by full year, quarters, trip purposes &
international visitors*

Kara Grau, M.S.

10/6/2017

A collection of 2016 full year and quarterly estimates of nonresident visitation, expenditures by nonresident travelers, and economic impact estimates, including expenditures by purpose of trip, airport of arrival, and international visitors.

*Revised, see Author Note, page ii

Visitation, Expenditures & Economic Impact Estimates *Revised*

Prepared by

Kara Grau, M.S.

Institute for Tourism & Recreation Research
College of Forestry and Conservation
The University of Montana
Missoula, MT 59812
www.itrr.umt.edu

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2016 Nonresident Visitation, Expenditures & Economic Impact Estimates

2017

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Author note about revised numbers:

ITRR has recalibrated numbers for 2015 and 2016 to reflect final numbers. These changes were needed due to an over-estimation of spending behavior in three categories. Subsequently, all three categories are downward adjusted. The new adjustment brings the categories in line with available secondary data estimates.

- *Made in MT and Farmers Market estimates were previously based on nonresidents identifying their full trip spending in Montana. These numbers are now divided by their length of stay to obtain daily spending and thus mirror the methods used for the other categories.*
- *Within Licenses, Fees, and Admissions, ITRR surveyors now also ask if they paid for their licenses (hunting and fishing) on line. This increased the estimates. However, because a hunting or fishing license is good for many days, this expenditure is also divided by the visitor's length of stay.*

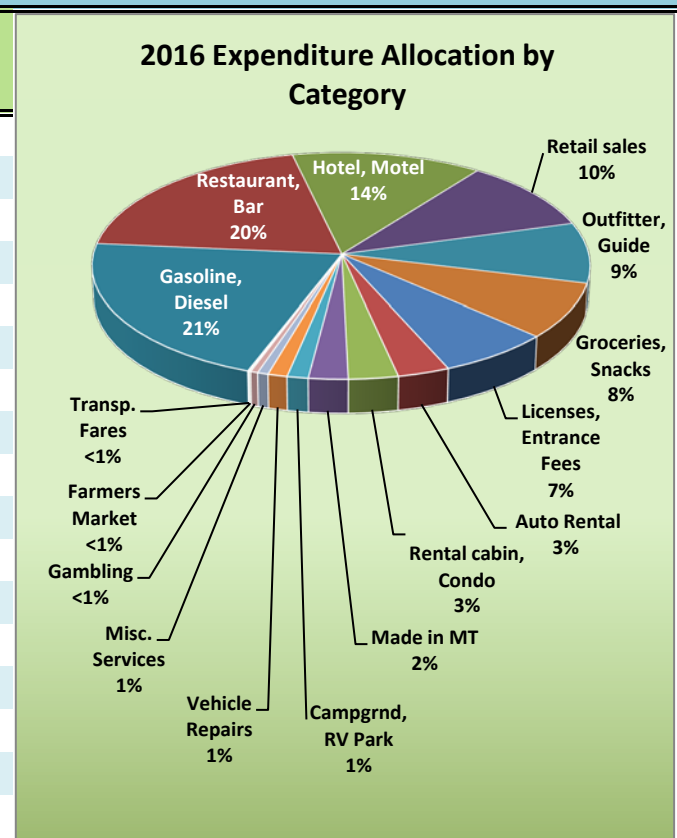
2016 Montana Nonresident Traveler Expenditures & Economic Contribution

2016 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2016, nonresident visitors to Montana spent an estimated \$3.04 billion in the state. (See Table 1 below)
- This \$3.04 billion in local spending directly supports \$2.51 billion of economic activity in the state, and supports an additional \$1.68 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$4.19 billion in 2016.

Table 1 - 2016 Nonresident Traveler Expenditures¹

Expenditure Category	Average Daily Per Group ^{2,3}	Allocation by Category	Total Expenditures ^{2,4}
Gasoline, Diesel	\$27.07	21%	\$636,200,000
Restaurant, Bar	\$25.95	20%	\$606,430,000
Hotel, Motel	\$17.66	14%	\$411,750,000
Retail sales	\$13.48	10%	\$315,620,000
Outfitter, Guide	\$11.61	9%	\$262,390,000
Groceries, Snacks	\$10.13	8%	\$238,150,000
Licenses, Entrance Fees	\$9.37	7%	\$203,980,000
Auto Rental	\$4.03	3%	\$92,690,000
Rental cabin, Condo	\$3.88	3%	\$88,560,000
Made in MT	\$3.01	2%	\$70,300,000
Campground, RV Park	\$1.58	1%	\$37,740,000
Vehicle Repairs	\$1.44	1%	\$34,380,000
Misc. Services	\$0.82	1%	\$19,130,000
Gambling	\$0.55	<1%	\$13,060,000
Farmers Market	\$0.13	<1%	\$3,090,000
Transportation Fares	\$0.11	<1%	\$2,390,000
Estimated Total	\$130.83		\$3,035,850,000



¹Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT.

²Data are collected quarterly. Therefore, avg. daily expenditures are weighted averages of quarterly figures. ³Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. ⁴Expenditure category totals may not add to year total due to rounding.

Table 2 - 2016 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$2,508,160,000	\$802,020,000	\$877,420,000	\$4,187,600,000
Employment (# of jobs)	34,670	5,670	7,320	47,660 *
Employee Compensation	\$797,480,000	\$178,560,000	\$233,820,000	\$1,209,860,000
Proprietor Income	\$106,470,000	\$46,790,000	\$38,040,000	\$191,300,000
Other Property Type Income	\$294,390,000	\$148,410,000	\$160,080,000	\$602,880,000
State & Local Taxes				\$180,700,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Output is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

Montana Nonresident Traveler Quarterly Travel Comparison

	Quarter 1 (Jan-Mar)	Quarter 2 (Apr-Jun)	Quarter 3 (Jul-Sep)	Quarter 4 (Oct-Dec)	Year Total ¹ 2016
Visitation & Length of Stay					
Nonresident Visitors	1,528,000	3,408,000	5,684,000	1,730,000	12,350,000
% of Total	12%	28%	46%	14%	100%
Nonresident Travel Groups	774,000	1,529,000	2,192,000	857,000	5,352,000
% of Total	14%	29%	41%	16%	100%
Group Size (people per group)	1.97	2.27	2.58	1.98	2.31
Length of Stay (nights)	3.54	4.08	4.85	4.36	4.36
Expenditure Category^{2,3} (Average Daily per Group)	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Year Total¹
Gasoline, Diesel	\$23.62	\$30.43	\$25.96	\$28.25	\$27.07
Restaurant, Bar	\$24.80	\$25.86	\$27.50	\$22.67	\$25.95
Hotel, B&B, etc.	\$18.92	\$17.41	\$18.35	\$15.03	\$17.66
Retail Sales	\$12.80	\$14.04	\$13.76	\$12.48	\$13.48
Outfitter, Guide	\$19.28	\$3.90	\$11.44	\$17.02	\$11.61
Groceries, Snacks	\$7.76	\$10.80	\$11.21	\$8.11	\$10.13
Licenses, Entrance Fees	\$28.49	\$1.53	\$5.18	\$16.41	\$9.37
Auto Rental	\$4.91	\$2.74	\$4.40	\$4.11	\$4.03
Rental Cabin, Condo	\$5.65	\$2.16	\$5.05	\$1.58	\$3.88
Made in MT	\$1.70	\$2.53	\$3.29	\$3.98	\$3.01
Campground, RV Park	\$0.04	\$1.73	\$2.39	\$0.38	\$1.58
Auto Repair	\$0.54	\$1.81	\$1.55	\$1.37	\$1.44
Misc. Services	\$1.87	\$1.25	\$0.31	\$0.78	\$0.82
Gambling	\$0.80	\$0.82	\$0.40	\$0.40	\$0.55
Farmers Market	\$0.01	\$0.07	\$0.24	\$0.02	\$0.13
Transportation Fares	\$0.33	\$0.06	\$0.08	\$0.07	\$0.11
	\$151.52	\$117.14	\$131.11	\$132.66	\$130.83
Total Expenditures	\$414,990,000	\$730,990,000	\$1,394,100,000	\$495,780,000	\$3,035,850,000
% of Total	14%	24%	46%	16%	100%

¹Data are collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. ²Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. ³Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

Montana Nonresident Traveler Expenditure Profiles

Average 2016 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping	Other
Sample size	12,488	4,757	2,292	3,505	1,303	209	388
Nonresident Travelers	12,350,000	4,718,000	2,273,000	3,471,000	1,297,000	210,000	382,000
Group Size (people/group)	2.31	2.69	2.24	2.13	1.60	1.94	2.18
Length of Stay (nights)	4.36	5.59	5.80	0.97	6.06	0.78	7.80
% of All Travelers in 2016	100%	38%	18%	28%	11%	2%	3%
Gasoline, Diesel	\$27.07	\$22.48	\$16.32	\$42.98	\$21.45	\$27.43	\$20.29
Restaurant, Bar	\$25.95	\$34.07	\$29.45	\$14.27	\$31.24	\$18.61	\$28.91
Hotel, B&B, etc.	\$17.66	\$21.00	\$11.66	\$14.56	\$28.05	\$9.98	\$13.63
Retail Sales	\$13.48	\$15.80	\$17.30	\$3.73	\$12.62	\$102.06	\$21.39
Outfitter, Guide	\$11.61	\$32.96	\$2.63	\$0.41	\$3.16	\$0.33	\$11.25
Groceries, Snacks	\$10.13	\$12.86	\$13.15	\$5.24	\$6.42	\$29.54	\$13.00
Licenses, Entrance Fees	\$9.37	\$22.44	\$7.42	\$0.50	\$5.74	\$0.69	\$9.90
Auto Rental	\$4.03	\$5.37	\$5.01	\$0.17	\$10.50	\$0.04	\$2.01
Rental Cabin, Condo	\$3.88	\$9.04	\$1.99	\$0.45	\$0.69	\$0.00	\$3.37
Made in MT	\$3.01	\$3.49	\$2.69	\$1.44	\$5.92	\$3.75	\$6.40
Campground, RV Park	\$1.58	\$2.68	\$0.34	\$1.22	\$0.16	\$0.32	\$0.23
Auto Repair	\$1.44	\$1.35	\$1.58	\$0.86	\$1.69	\$9.10	\$3.63
Misc. Services	\$0.82	\$0.94	\$1.14	\$0.47	\$0.55	\$0.91	\$4.00
Gambling	\$0.55	\$0.60	\$0.88	\$0.62	\$0.60	\$0.36	\$0.36
Farmers Market	\$0.13	\$0.13	\$0.22	\$0.08	\$0.10	\$0.34	\$0.13
Transportation Fares	\$0.11	\$0.28	\$0.06	\$0.00	\$0.16	\$0.00	\$0.04
Total Avg. Daily per Group	\$130.83	\$185.50	\$111.84	\$87.01	\$129.05	\$203.46	\$138.53

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=10,302)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	6608	64%	\$42.12	\$35.00
Restaurant, Bar	5400	52%	\$49.70	\$35.00
Hotel, B&B, etc.	3558	35%	\$119.80	\$106.00
Groceries, Snacks	3042	30%	\$34.39	\$20.00
Licenses, Entrance Fees	1641	16%	\$64.61	\$15.00
Made in MT	1445	14%	\$21.55	\$7.50
Retail Sales	1368	13%	\$102.23	\$50.00
Campground, RV Park	1060	10%	\$37.99	\$37.81
Auto Rental	888	9%	\$48.05	\$48.13
Rental Cabin, Condo	488	5%	\$194.20	\$150.00
Outfitter, Guide	332	3%	\$378.25	\$279.84
Farmers Market	314	3%	\$4.09	\$3.00
Misc. Services	206	2%	\$40.08	\$15.00
Gambling	194	2%	\$28.08	\$30.57
Auto Repair	123	1%	\$121.01	\$125.00
Transportation Fares	46	<1%	\$24.83	\$24.34

Data are collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures.

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value.

Quarter 1, 2016

Montana Nonresident Traveler Expenditure Profiles

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Average Q1 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	1,908	447	303	706	330	44	79
Nonresident Travelers	1,528,000	357,000	243,000	565,000	264,000	35,000	63,000
Group Size (people/group)	1.97	2.53	2.00	1.85	1.51	1.85	1.80
Length of Stay (nights)	3.54	6.10	4.87	0.63	4.49	0.15	8.06
% of All Travelers in Q1	100%	23%	16%	37%	17%	2%	4%
Licenses, Entrance Fees	\$28.49	\$75.06	\$18.14	\$0.43	\$5.73	\$1.08	\$8.86
Restaurant, Bar	\$24.80	\$47.64	\$34.63	\$10.64	\$24.30	\$4.99	\$16.40
Gasoline, Diesel	\$23.62	\$13.79	\$15.56	\$34.49	\$19.41	\$26.78	\$17.74
Outfitter, Guide	\$19.28	\$80.18	\$2.25	\$0.00	\$4.75	\$0.00	\$0.00
Hotel, B&B, etc.	\$18.92	\$23.96	\$16.78	\$12.27	\$33.13	\$0.42	\$11.66
Retail Sales	\$12.80	\$22.05	\$24.70	\$4.39	\$6.46	\$30.50	\$18.83
Groceries, Snacks	\$7.76	\$12.86	\$14.16	\$3.27	\$5.20	\$21.44	\$3.67
Rental Cabin, Condo	\$5.65	\$21.39	\$2.01	\$0.05	\$0.09	\$0.00	\$12.18
Auto Rental	\$4.91	\$8.98	\$5.18	\$0.06	\$11.54	\$0.00	\$2.08
Misc. Services	\$1.87	\$2.62	\$4.97	\$1.02	\$0.53	\$0.71	\$2.27
Made in MT	\$1.70	\$3.57	\$2.86	\$0.41	\$1.58	\$0.00	\$1.46
Gambling	\$0.80	\$2.16	\$0.67	\$0.12	\$0.35	\$0.89	\$2.10
Auto Repair	\$0.54	\$0.27	\$1.61	\$0.14	\$0.26	\$0.42	\$3.45
Transportation Fares	\$0.33	\$1.25	\$0.05	\$0.00	\$0.20	\$0.00	\$0.19
Campground, RV Park	\$0.04	\$0.03	\$0.00	\$0.07	\$0.04	\$0.00	\$0.00
Farmers Market	\$0.01	\$0.00	\$0.06	\$0.00	\$0.00	\$0.00	\$0.00
Total Avg. Daily per Group	\$151.52	\$315.81	\$143.63	\$67.36	\$113.57	\$87.23	\$100.89

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,578)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1060	67%	\$35.17	\$30.00
Restaurant, Bar	761	48%	\$51.42	\$30.00
Hotel, B&B, etc.	488	31%	\$105.82	\$100.00
Groceries, Snacks	367	23%	\$33.35	\$20.00
Licenses, Entrance Fees	224	14%	\$200.76	\$90.00
Made in MT	197	12%	\$13.58	\$8.00
Retail Sales	191	12%	\$105.57	\$50.00
Auto Rental	156	10%	\$49.64	\$50.00
Rental Cabin, Condo	65	4%	\$237.84	\$200.00
Outfitter, Guide	52	3%	\$584.95	\$728.07
Gambling	42	3%	\$30.41	\$23.34
Misc. Services	33	2%	\$88.48	\$24.11
Auto Repair	16	1%	\$54.70	\$40.65
Transportation Fares	15	1%	\$35.93	\$37.18
Campground, RV Park	9	1%	\$15.68	\$15.90
Farmers Market	2	0%	\$6.13	\$7.41

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 2, 2016

Montana Nonresident Traveler Expenditure Profiles

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Average Q2 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other
Sample size	2,909	978	547	856	302	68	149
Nonresident Travelers	3,408,000	1,149,000	641,000	1,005,000	354,000	82,000	174,000
Group Size (people/group)	2.27	2.60	2.26	2.19	1.55	1.99	2.24
Length of Stay (nights)	4.08	5.10	5.50	1.10	5.97	0.34	7.32
% of All Travelers in Q2	100%	34%	19%	30%	10%	2%	5%
Gasoline, Diesel	\$30.43	\$28.77	\$16.43	\$45.11	\$21.79	\$27.35	\$19.20
Restaurant, Bar	\$25.86	\$32.57	\$27.82	\$16.38	\$31.88	\$14.68	\$24.43
Hotel, B&B, etc.	\$17.41	\$21.12	\$11.58	\$15.73	\$26.97	\$4.04	\$7.76
Retail Sales	\$14.04	\$13.66	\$22.41	\$3.20	\$13.63	\$107.63	\$8.82
Groceries, Snacks	\$10.80	\$13.47	\$14.28	\$5.92	\$5.82	\$32.62	\$10.33
Outfitter, Guide	\$3.90	\$8.97	\$1.45	\$0.41	\$0.63	\$0.00	\$7.50
Auto Rental	\$2.74	\$2.99	\$5.27	\$0.13	\$6.21	\$0.20	\$2.78
Made in MT	\$2.53	\$3.02	\$2.75	\$1.45	\$1.70	\$3.14	\$7.09
Rental Cabin, Condo	\$2.16	\$5.16	\$1.07	\$0.31	\$1.01	\$0.00	\$0.23
Auto Repair	\$1.81	\$2.57	\$1.20	\$1.15	\$1.57	\$1.14	\$3.57
Campground, RV Park	\$1.73	\$3.66	\$0.45	\$1.17	\$0.23	\$0.00	\$0.23
Licenses, Entrance Fees	\$1.53	\$3.84	\$2.12	\$0.42	\$1.46	\$0.98	\$7.29
Misc. Services	\$1.25	\$1.15	\$0.81	\$0.87	\$0.27	\$2.10	\$7.18
Gambling	\$0.82	\$0.54	\$1.03	\$1.11	\$0.59	\$1.96	\$0.16
Farmers Market	\$0.07	\$0.09	\$0.07	\$0.02	\$0.14	\$0.00	\$0.21
Transportation Fares	\$0.06	\$0.14	\$0.00	\$0.00	\$0.10	\$0.00	\$0.00
Total Avg. Daily per Group	\$117.14	\$141.72	\$108.74	\$93.38	\$114.00	\$195.84	\$106.78

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=2,371)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1598	67%	\$45.15	\$37.00
Restaurant, Bar	1293	55%	\$47.41	\$35.00
Hotel, B&B, etc.	856	36%	\$117.39	\$102.00
Groceries, Snacks	718	30%	\$35.65	\$20.00
Retail Sales	339	14%	\$98.08	\$50.00
Made in MT	270	11%	\$22.49	\$11.14
Licenses, Entrance Fees	279	12%	\$20.37	\$10.00
Campground, RV Park	283	12%	\$37.87	\$38.00
Auto Rental	157	7%	\$41.46	\$45.65
Rental Cabin, Condo	102	4%	\$122.42	\$127.17
Misc. Services	62	3%	\$47.65	\$25.00
Outfitter, Guide	56	2%	\$165.25	\$205.42
Gambling	46	2%	\$41.67	\$50.00
Farmers Market	33	1%	\$5.27	\$2.86
Auto Repair	41	2%	\$105.43	\$146.98
Transportation Fares	10	0%	\$15.03	\$15.03

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 3, 2016

Montana Nonresident Traveler Expenditure Profiles

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Average Q3 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other
Sample size	5,248	2,713	885	1,142	332	51	99
Nonresident Travelers	5,685,000	2,950,000	966,000	1,245,000	364,000	57,000	108,000
Group Size (people/group)	2.58	2.85	2.36	2.36	1.86	1.89	2.54
Length of Stay (nights)	4.85	5.53	6.39	1.22	6.95	1.95	9.29
% of All Travelers in Q3	100%	52%	17%	22%	6%	1%	2%
Restaurant, Bar	\$27.50	\$31.03	\$29.75	\$14.15	\$35.98	\$19.84	\$38.05
Gasoline, Diesel	\$25.96	\$23.04	\$16.50	\$41.60	\$23.01	\$29.73	\$22.33
Hotel, B&B, etc.	\$18.35	\$20.86	\$11.24	\$14.56	\$29.74	\$10.66	\$18.94
Retail Sales	\$13.76	\$15.71	\$12.28	\$3.84	\$17.42	\$88.47	\$35.65
Outfitter, Guide	\$11.44	\$19.08	\$4.25	\$0.61	\$3.96	\$0.54	\$18.17
Groceries, Snacks	\$11.21	\$12.78	\$13.41	\$5.29	\$7.73	\$32.89	\$18.96
Licenses, Entrance Fees	\$5.18	\$6.54	\$5.90	\$0.51	\$6.18	\$0.54	\$13.94
Rental Cabin, Condo	\$5.05	\$8.24	\$2.75	\$0.73	\$0.87	\$0.00	\$4.27
Auto Rental	\$4.40	\$4.76	\$5.46	\$0.26	\$13.23	\$0.00	\$1.35
Made in MT	\$3.29	\$3.82	\$2.82	\$1.64	\$4.28	\$5.15	\$7.41
Campground, RV Park	\$2.39	\$3.70	\$0.48	\$1.68	\$0.20	\$0.52	\$0.33
Auto Repair	\$1.55	\$1.50	\$2.07	\$0.74	\$1.35	\$14.47	\$1.83
Gambling	\$0.40	\$0.24	\$0.78	\$0.39	\$0.91	\$0.00	\$0.10
Misc. Services	\$0.31	\$0.28	\$0.60	\$0.08	\$0.05	\$0.86	\$1.92
Farmers Market	\$0.24	\$0.22	\$0.44	\$0.16	\$0.17	\$0.55	\$0.11
Transportation Fares	\$0.08	\$0.10	\$0.11	\$0.00	\$0.14	\$0.00	\$0.04
Total Avg. Daily per Group	\$131.11	\$151.90	\$108.84	\$86.24	\$145.22	\$204.22	\$183.40

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=4,331)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	2724	63%	\$41.27	\$35.00
Restaurant, Bar	2327	54%	\$51.18	\$40.00
Hotel, B&B, etc.	1522	35%	\$133.17	\$120.00
Groceries, Snacks	1411	33%	\$34.40	\$20.00
Licenses, Entrance Fees	837	19%	\$26.82	\$10.00
Made in MT	730	17%	\$19.52	\$7.14
Campground, RV Park	708	16%	\$38.55	\$39.00
Retail Sales	622	14%	\$95.74	\$50.00
Auto Rental	366	8%	\$52.06	\$50.00
Farmers Market	259	6%	\$4.04	\$3.00
Rental Cabin, Condo	256	6%	\$217.62	\$200.00
Outfitter, Guide	182	4%	\$272.29	\$250.00
Gambling	77	2%	\$22.68	\$20.00
Misc. Services	76	2%	\$17.58	\$13.00
Auto Repair	47	1%	\$143.36	\$126.37
Transportation Fares	13	<1%	\$27.39	\$30.29

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 4, 2016

Montana Nonresident Traveler Expenditure Profiles

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Average Q4 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	2,423	619	557	801	339	46	61
Nonresident Travelers	1,730,000	441,000	398,000	571,000	242,000	33,000	43,000
Group Size (people/group)	1.98	2.20	2.11	1.94	1.45	1.99	1.80
Length of Stay (nights)	4.36	6.60	5.69	0.68	6.91	0.87	6.26
% of All Travelers in Q4	100%	26%	23%	33%	14%	2%	3%
Gasoline, Diesel	\$28.25	\$21.21	\$16.18	\$46.35	\$19.94	\$20.38	\$18.15
Restaurant, Bar	\$22.67	\$32.29	\$28.21	\$10.08	\$27.43	\$19.17	\$19.15
Outfitter, Guide	\$17.02	\$61.96	\$0.91	\$0.00	\$3.99	\$0.00	\$8.47
Licenses, Entrance Fees	\$16.41	\$45.53	\$13.17	\$0.80	\$9.90	\$0.88	\$1.59
Hotel, B&B, etc.	\$15.03	\$18.34	\$9.68	\$12.17	\$24.18	\$13.78	\$15.85
Retail Sales	\$12.48	\$12.56	\$16.52	\$4.68	\$7.91	\$144.09	\$7.08
Groceries, Snacks	\$8.11	\$12.33	\$10.05	\$4.09	\$5.86	\$16.85	\$7.24
Auto Rental	\$4.11	\$6.84	\$3.37	\$0.09	\$10.83	\$0.00	\$1.76
Made in MT	\$3.98	\$2.96	\$2.19	\$1.36	\$15.23	\$0.18	\$5.06
Rental Cabin, Condo	\$1.58	\$4.25	\$1.63	\$0.19	\$0.39	\$0.00	\$0.00
Auto Repair	\$1.37	\$0.33	\$1.01	\$0.77	\$3.05	\$0.00	\$14.41
Misc. Services	\$0.78	\$1.16	\$0.61	\$0.15	\$1.57	\$0.00	\$2.69
Gambling	\$0.40	\$0.26	\$1.02	\$0.17	\$0.31	\$0.00	\$0.12
Campground, RV Park	\$0.38	\$0.74	\$0.04	\$0.50	\$0.07	\$0.00	\$0.00
Transportation Fares	\$0.07	\$0.10	\$0.04	\$0.01	\$0.24	\$0.00	\$0.00
Farmers Market	\$0.02	\$0.01	\$0.05	\$0.02	\$0.02	\$0.00	\$0.00
Total Avg. Daily per Group	\$132.66	\$220.86	\$104.68	\$81.42	\$130.92	\$215.33	\$101.57

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=2,023)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1227	61%	\$46.58	\$38.00
Restaurant, Bar	1018	50%	\$45.02	\$32.00
Hotel, B&B, etc.	691	34%	\$102.82	\$100.00
Groceries, Snacks	545	27%	\$30.09	\$20.00
Licenses, Entrance Fees	310	15%	\$107.24	\$50.00
Made in MT	247	12%	\$33.09	\$7.50
Retail Sales	215	11%	\$117.37	\$50.00
Auto Rental	209	10%	\$39.71	\$45.00
Rental Cabin, Condo	65	3%	\$114.59	\$139.55
Campground, RV Park	60	3%	\$32.02	\$37.81
Outfitter, Guide	43	2%	\$808.53	\$836.07
Misc. Services	34	2%	\$45.93	\$26.40
Gambling	29	1%	\$27.91	\$30.66
Auto Repair	20	1%	\$140.31	\$173.34
Farmers Market	19	1%	\$2.48	\$1.39
Transportation Fares	9	0%	\$15.84	\$15.00

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

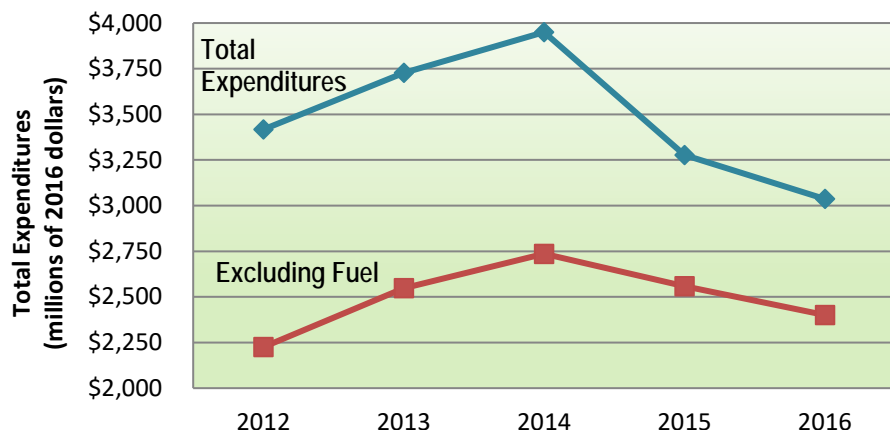
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2006-2016 Montana Nonresident Traveler Expenditure Trends Overall Total & Excluding Fuel*

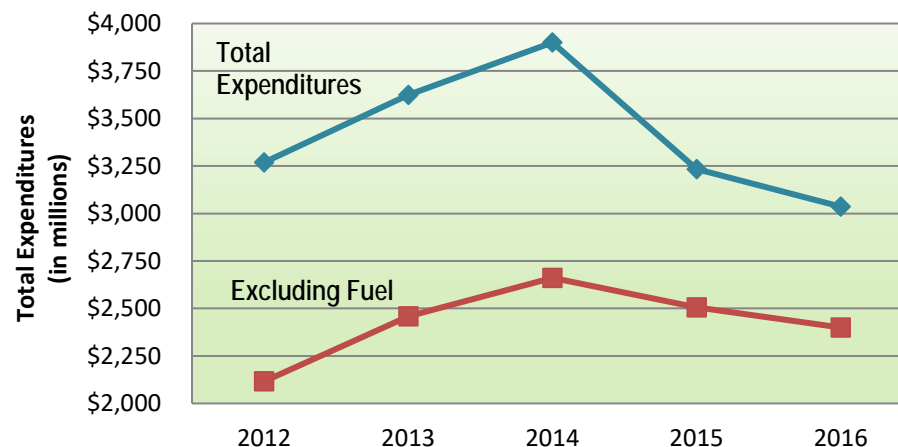
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Total Inflation-Adjusted Expenditures¹



Total Actual Expenditures¹

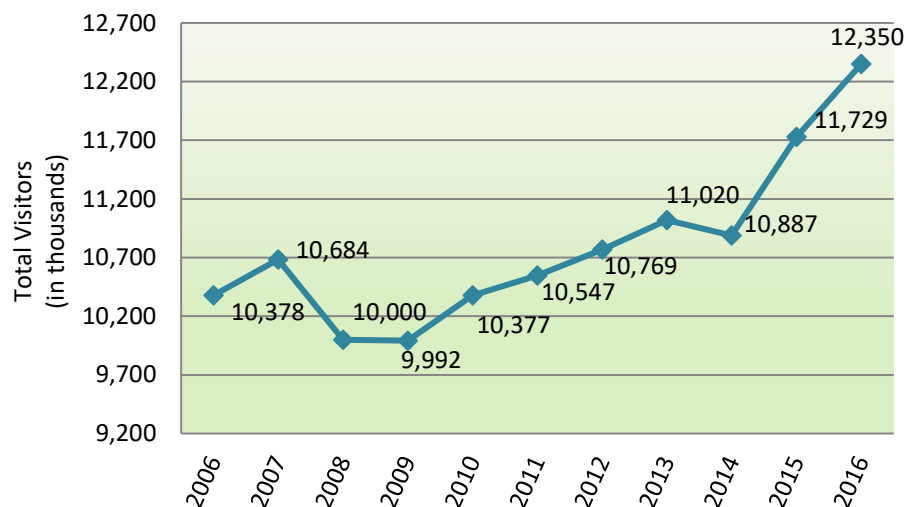


Nonresident Traveler Expenditure Trends	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total Inflation-adjusted Expenditures											
(millions of 2016 dollars ²)	\$3,469	\$3,571	\$3,041	\$2,542	\$2,693	\$2,960	\$3,417	\$3,728	\$3,950	\$3,277	\$3,036
% Change from Previous Year	3.8%	2.9%	-14.8%	-16.4%	5.9%	9.9%	15.4%	9.1%	6.0%	-17.0%	-7.4%
Excluding Fuel Expenditures (2016\$)											
	\$2,508	\$2,551	\$2,259	\$1,745	\$1,819	\$1,955	\$2,225	\$2,547	\$2,736	\$2,558	\$2,400
% Change from Previous Year		1.7%	-11.4%	-22.8%	4.2%	7.5%	13.8%	14.5%	7.4%	-6.5%	-6.2%
Total Actual Expenditures (in millions)											
	\$2,914	\$3,085	\$2,728	\$2,272	\$2,447	\$2,774	\$3,269	\$3,624	\$3,900	\$3,233	\$3,036
% Change from Previous Year	5.8%	5.9%	-11.6%	-16.7%	7.7%	13.4%	17.8%	10.9%	7.6%	-17.1%	-6.1%
Excluding Fuel Expenditures											
	\$2,096	\$2,219	\$1,967	\$1,561	\$1,651	\$1,827	\$2,116	\$2,459	\$2,661	\$2,506	\$2,400
% Change from Previous Year		5.9%	-11.4%	-20.6%	5.8%	10.7%	15.8%	16.2%	8.2%	-5.8%	-4.2%

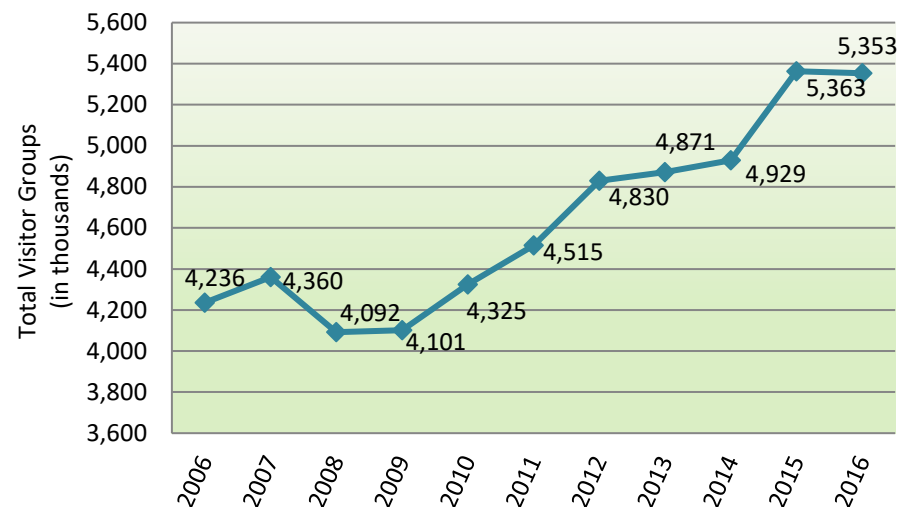
*Fuel is generally the largest portion of nonresident travelers' spending, making total traveler expenditure figures susceptible to fluctuations in gas prices. Removing fuel expenditures from the total allows for the trend to be viewed without this external factor's effect. ¹See Author Note, page ii, for more information. ²U.S. Bureau of Labor Statistics. Consumer Price Index - All Urban Consumers.

2006-2016 Montana Nonresident Traveler Visitation Trends

Nonresident Visitors



Nonresident Travel Groups



Nonresident Traveler Visitation Trends	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Nonresident Visitors (in thousands)	10,378	10,684	10,000	9,992	10,377	10,547	10,769	11,020	10,887	11,729	12,350
% Change from Previous Year	2.5%	2.9%	-6.4%	-0.1%	3.9%	1.6%	2.1%	2.3%	-1.2%	7.7%	5.3%
Nonresident Travel Groups (in thousands ¹)	4,236	4,360	4,092	4,101	4,325	4,515	4,830	4,871	4,929	5,363	5,353
% Change from Previous Year	2.6%	2.9%	-6.1%	0.2%	5.5%	4.4%	7.0%	0.8%	1.2%	8.8%	-0.2%
Average people per group	2.45	2.45	2.45	2.46	2.38	2.31	2.22	2.24	2.19	2.19	2.31

¹Beginning in 2010, group size is a weighted average of quarterly group sizes.

2016 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana

Overseas Visitors ¹				Canadian Visitors				Domestic Visitors			
Sample size	328			1,370			10,782				
Nonresident Travelers	324,000			1,356,000			10,670,000				
Group Size (people/group)	2.77			2.30			2.30				
Length of Stay (nights)	5.35			2.16			4.61				
% of All Travelers in 2016	3%			11%			87%				
Expenditure Category ^{2,3}	Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend		Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend		Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend
Gasoline, Diesel	\$23.89	15%	\$127.86		\$32.96	25%	\$71.09		\$26.37	20%	\$121.57
Restaurant, Bar	\$36.06	23%	\$193.05		\$24.71	19%	\$53.29		\$25.94	20%	\$119.55
Hotel, B&B, etc.	\$29.10	19%	\$155.79		\$15.80	12%	\$34.07		\$17.57	13%	\$81.00
Retail Sales	\$9.82	6%	\$52.58		\$23.41	18%	\$50.49		\$12.44	9%	\$57.35
Outfitter, Guide	\$23.48	15%	\$125.68		\$1.76	1%	\$3.79		\$12.75	10%	\$58.77
Groceries, Snacks	\$12.02	8%	\$64.33		\$13.01	10%	\$28.05		\$9.76	7%	\$44.99
Licenses, Entrance Fees	\$6.03	4%	\$32.30		\$8.80	7%	\$18.97		\$10.03	8%	\$46.24
Auto Rental	\$5.42	3%	\$29.03		\$0.47	<1%	\$1.00		\$4.46	3%	\$20.57
Rental Cabin, Condo	\$5.95	4%	\$31.85		\$1.58	1%	\$3.40		\$4.08	3%	\$18.81
Made in Montana	\$2.31	1%	\$12.36		\$3.84	3%	\$8.29		\$3.05	2%	\$14.06
Campground, RV Park	\$1.43	1%	\$7.66		\$1.60	1%	\$3.44		\$1.58	1%	\$7.30
Auto Repair	\$0.00	<1%	\$0.00		\$1.48	1%	\$3.20		\$1.52	1%	\$6.99
Misc. Services	\$1.07	1%	\$5.71		\$0.90	1%	\$1.94		\$0.80	1%	\$3.67
Gambling	\$0.01	<1%	\$0.06		\$0.83	1%	\$1.79		\$0.54	<1%	\$2.48
Farmers Market	\$0.16	<1%	\$0.84		\$0.17	<1%	\$0.37		\$0.13	<1%	\$0.60
Transportation Fares	\$0.37	<1%	\$1.95		\$0.10	<1%	\$0.22		\$0.11	<1%	\$0.49
Total Average Daily per Group	\$157.12		\$841.05		\$131.40		\$283.40		\$131.13		\$604.45
Total 2016 Expenditures	\$119,550,000				\$162,720,000				\$2,753,580,000		
% of Total	4%				5%				91%		

¹Numerous overseas visitors may pre-pay for many of their trip expenses, which are not reflected here; these figures represent only expenditures made in MT. ²Data is collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. ³Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. ⁴Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

2016 Montana Airport of Arrival Statewide Nonresident Expenditure Profiles

Avg. Daily Group Expenditures by Airport of Arrival¹ (Expenditures represent full trip in MT, not spending exclusively in arrival city.)

	Airport of Arrival in Montana ^{2, 3}						
	All Fliers	Billings	Bozeman	Great Falls	Helena	Kalispell	Missoula
Sample size	1,529	325	522	135	60	211	258
Nonresident Travelers	1,528,000	320,000	520,000	140,000	60,000	210,000	260,000
Group Size (people/group)	2.13	2.15	2.22	1.85	1.44	2.44	1.86
Length of Stay (nights)	6.97	7.15	6.40	6.40	5.45	8.44	7.48
% of All Travelers in 2016	12.6%	2.6%	4.2%	1.1%	0.5%	1.7%	2.1%
Restaurant, Bar	\$44.32	\$31.27	\$55.37	\$37.26	\$44.95	\$49.37	\$37.73
Outfitter, Guide	\$43.24	\$21.37	\$86.52	\$18.11	\$11.09	\$22.17	\$21.97
Licenses, Entrance Fees	\$26.67	\$13.87	\$59.65	\$9.65	\$6.00	\$9.36	\$6.59
Auto Rental	\$25.58	\$32.95	\$28.96	\$18.60	\$15.44	\$24.55	\$18.59
Retail Sales	\$21.05	\$10.46	\$23.96	\$13.67	\$15.55	\$28.94	\$25.91
Hotel, B&B, etc.	\$20.94	\$19.95	\$22.64	\$18.44	\$22.07	\$21.40	\$19.15
Groceries, Snacks	\$11.86	\$8.81	\$12.96	\$10.98	\$7.94	\$14.51	\$11.28
Gasoline, Diesel	\$9.62	\$11.22	\$9.26	\$9.38	\$6.12	\$11.20	\$8.49
Rental Cabin, Condo	\$6.53	\$5.04	\$9.16	\$3.42	\$1.04	\$5.12	\$7.18
Made in Montana	\$6.17	\$1.05	\$10.30	\$8.06	\$4.15	\$4.52	\$5.75
Misc. Services	\$1.59	\$1.08	\$2.37	\$1.58	\$1.29	\$1.72	\$0.77
Auto Repair	\$0.87	\$0.97	\$0.86	\$0.94	\$0.00	\$0.00	\$1.68
Gambling	\$0.83	\$0.80	\$1.02	\$1.12	\$0.67	\$0.01	\$0.67
Transportation Fares	\$0.58	\$0.00	\$1.07	\$0.03	\$0.00	\$0.96	\$0.33
Farmers Market	\$0.18	\$0.15	\$0.09	\$0.16	\$0.18	\$0.18	\$0.38
Campground, RV Park	\$0.08	\$0.16	\$0.05	\$0.07	\$0.11	\$0.05	\$0.06
Total Avg. Daily per Group	\$220.12	\$159.12	\$324.24	\$151.46	\$136.60	\$194.06	\$166.52
Estimate of Statewide Spending	\$993,090,000	\$159,070,000	\$465,900,000	\$56,630,000	\$19,260,000	\$148,270,000	\$138,610,000

¹Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. ²Spending data presented here are representative of expenditures in MT by traveler groups who flew into one of the listed airports. ³Butte and West Yellowstone airports had insufficient sample sizes for inclusion in this analysis.